

NORTH CAROLINA
INDEPENDENT
COLLEGES & UNIVERSITIES

Advancement Services

At Your Service: Keeping Your Database Clean and Automating Processes

Kim Berry, Associate Vice President (Guilford College)

Austen Brown, Database Consultant & Automation Engineer (Prenger Solutions Group)

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2:15 PM

Founders Gallery West, 2nd Floor

Who We Are!



Kim Berry

*Associate Vice President
Guilford College*



Austen Brown

*Database Consultant, Automation Engineer
Prenger Solutions Group*




Data is “Clean” when it is without...

- Errors/Inaccuracies
- Duplicates
- Redundancy
- Inconsistent Entry

It's an ongoing process; do not expect or promise perfection.



Quality Assurance Checks

- Merging Duplicate Records
 - Missing Contact Information (Address/Emails/Phones); marking as inactive
 - Missing Constituent Codes
 - Addressees/Salutations
 - Properly Deceasing Records
 - Writing off pledges
 - Table/Code Clean-up
 - When to run - Daily? Weekly? Monthly?
- *when you spot the error ...*
- 

The Bane of Our Existence

What are the areas where we receive most complaints?

- Email - wrong address, hard/soft bounces, contact codes, “I didn’t receive it”
- Inclusion/Exclusion - explaining why someone did/did not appear on a list
- No one “owning” responsibility for ensuring fields updated
 - volunteer codes, scholarship recipients, fund contacts, organizational contacts, award recipients
- The US Postal Service ... “undeliverable as addressed”



It Bears Repeating

- Garbage In, Garbage Out
- Conversions are a big deal; be sure you've addressed questions in advance
- Consistency is key; have a policy/procedure manual and update it constantly
- Data is a scapegoat
- Business Rules (required fields) can be a saving grace



Plugins and Apps and Syncing - Oh My!

- Utilize apps and integrations, and data appends to manage data i.e.
 - standardize ZIP+4, marking phone/email as primary, remove blank address lines, post/unpost gifts, global changes
- NCOA updates
- Are you using another platform to collect data/gifts? How do you sync and import information?

Wouldn't it be great if you could automate some of these tasks?

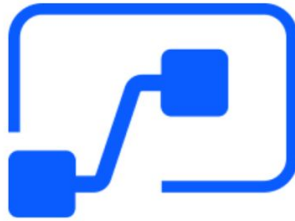


Power Automate

- Available through O365 via the Microsoft Power Platform
- Easy to use, a low-code/no-code solution (No coding experience required!)
- Leverage to automate business processes and build workflows

















Imagine the time you'd have back if your repetitive tasks were taken care of...





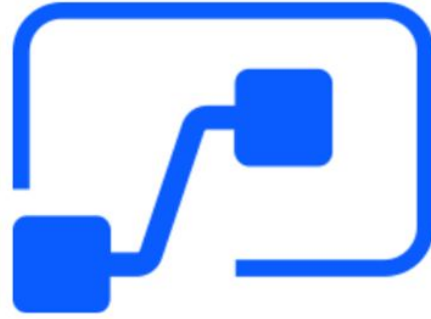
Power Automate



 <p>Follow up on a message By Microsoft</p> <p>Instant 244003</p>	 <p>Schedule a reply By Microsoft</p> <p>Instant 131119</p>	 <p>Start an approval when a file is added to Sharepoint By Microsoft</p> <p>Automated 85787</p>	 <p>Save a message to OneNote By Microsoft</p> <p>Instant 69659</p>
 <p>Get notified when you're @mentioned email By Microsoft</p> <p>Automated 63244</p>	 <p>Create a Planner task when a channel post starts with TODO By Microsoft</p> <p>Automated 46251</p>	 <p>Forward emails to a channel By Microsoft</p> <p>Automated 36757</p>	 <p>Create a Teams chat from an email when it has 'createachat' By Microsoft</p> <p>Automated 8774</p>
 <p>Notify a team when Planner tasks change status By Microsoft</p> <p>Automated 6928</p>	 <p>Analyze emails sentiment with AI Builder and send results to Teams By Microsoft</p> <p>Automated 4604</p>	 <p>Click a button to email a note By Microsoft</p> <p>Instant 232846</p>	 <p>Get today's weather forecast for my current location By Microsoft</p> <p>Instant 363094</p>
 <p>Send a customized email when a new file is added By Microsoft</p> <p>Automated 563155</p>	 <p>Save Office 365 email attachments to OneDrive for Business By Microsoft</p> <p>Automated 964013</p>	 <p>Get a push notification with updates from the Power Automate blog By Microsoft</p> <p>Automated 170340</p>	 <p>Get a push notification when you receive an email from your boss By Microsoft</p> <p>Automated 536065</p>

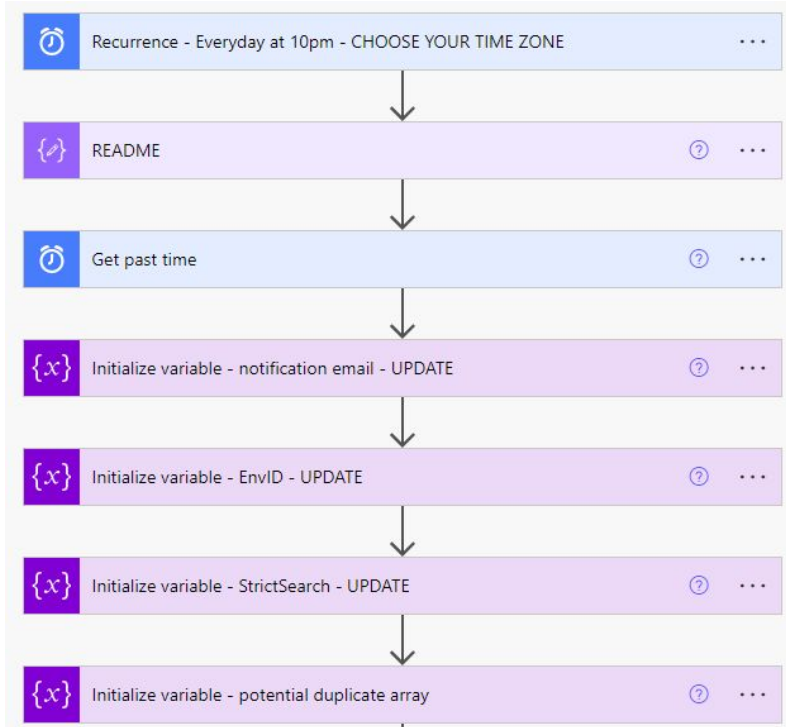
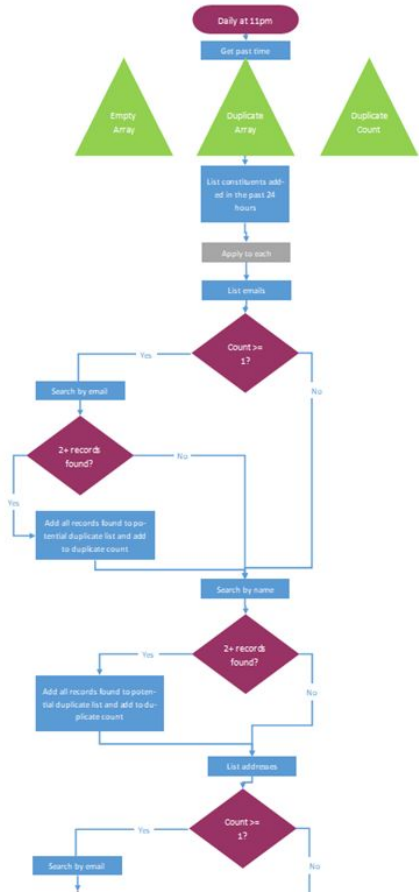


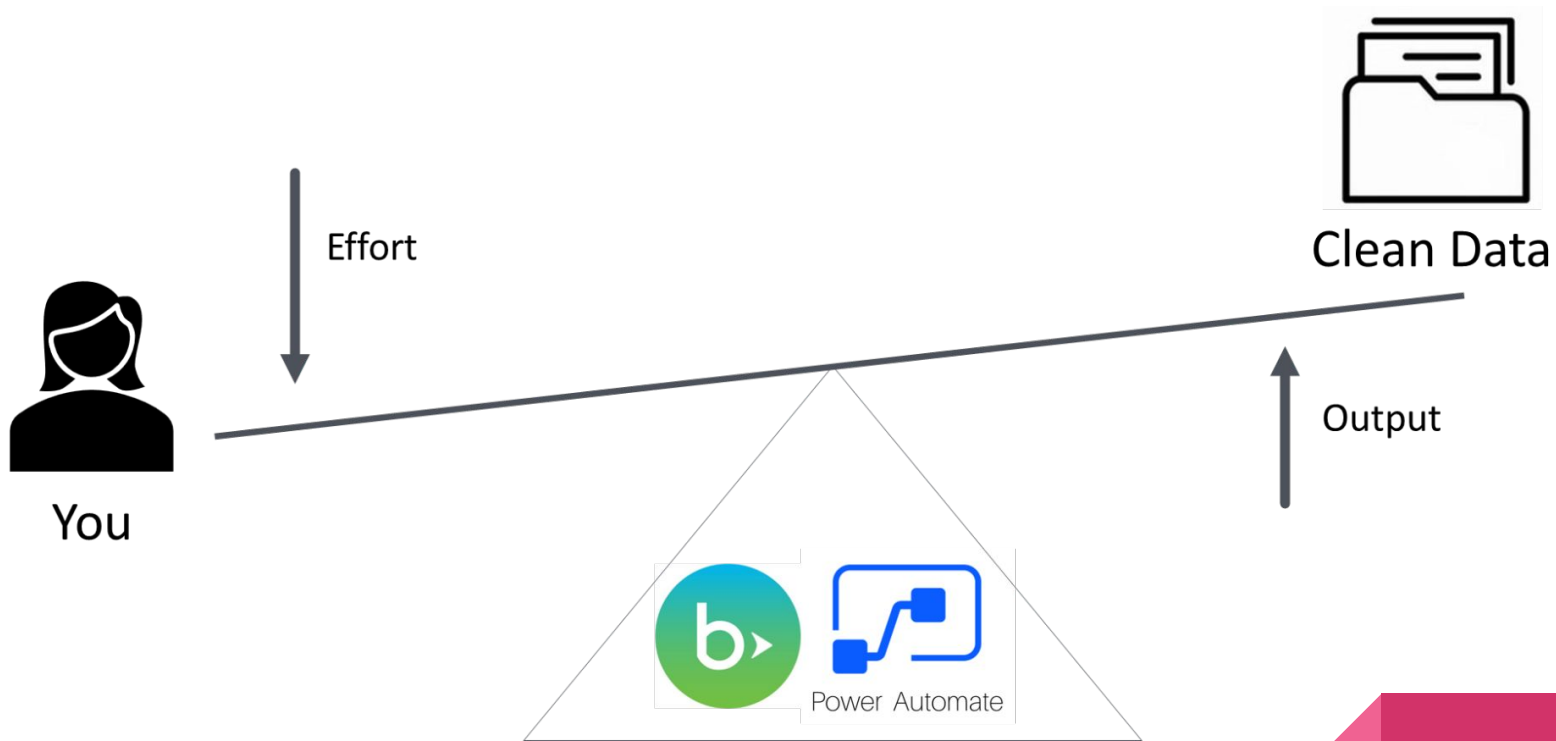
The Power of Automation



Power Automate







Automation Ideas to aid with data clean-up

1. Alert when duplicate constituents are created*
2. Automatically fill in blank 'preferred' name/nickname fields
3. Mark emails/phones as primary
4. Validate new emails, alert staff when an email is invalid
5. Allow non-privileged users to submit record changes*
6. Update consent records from info provided by a constituent through email*
7. Mark records with a blank address has 'No Valid Address'

**Denotes an existing template within the Blackbaud Power Platform Template Showcase.*



Automation Ideas to aid with fundraising

1. Automatically run donor acknowledgement letters*
2. Provide an email supplement to year-end tax letters
3. Bring data directly from an online census form into the database
4. Alert staff when a large gift from an unassigned donor is received
5. Alert staff when an opportunity has an upcoming ask date*
6. Alert a gift officer when a portfolio donor makes a gift*
7. Automatically tag giving circle/society members*

**Denotes an existing template within the Blackbaud Power Platform Template Showcase.*





<https://askgenius.com/automategenius/>



Scan the QR Code or visit the link above to learn more about what Prenger Solutions Group's cutting-edge automation service called AutomateGenius. Nonprofits use this service to delight their donors, streamline gift processing, create automated reports and raise more money!



Additional Information/Resources

- Leagcy.com / Google Alerts for Deceased Notification
- Blackbaud's On-Demand Power Automate Accelerator Course:
<https://docs.blackbaud.com/microsoft-connectors-docs/microsoft-power-platform/getting-started/training>
- Blog: Can Power Automate Really Help Me?:
<https://community.blackbaud.com/blogs/13/8292>
- Blackbaud's Power Platform Template Showcase:
<https://docs.blackbaud.com/microsoft-connectors-docs/microsoft-power-platform/showcase>
- sgEngage Article: The Benefits of Automation, Creating a Business Case:
<https://npengage.com/nonprofit/building-the-business-case-and-proving-the-roi-of-your-extensibility-project/>

Keep in touch!

Kim Berry

*Associate Vice President
Guilford College*

Email: kberry@guilford.edu

LinkedIn:

<https://www.linkedin.com/in/kimberlyberry/>

Austen Brown

*Database Consultant, Automation Engineer
Prenger Solutions Group*

Email: austen@prengersolutions.com

LinkedIn:

<https://www.linkedin.com/in/austen-brown-8b699330/>

Stick Around!

If you are a Blackbaud client or thinking about becoming one, stick around for 30-45 minutes for a conversation with [Chris Harris](#), Manager of the Higher Education Customer Success team.

